

PART 1

WHAT IS JOB-SIZING?

Job sizing is about responsibility, not workload.

Job-Sizing is a means by which the salary for leadership roles in schools can be assessed in a fair and consistent manner. There should be no leadership (PT/DHT/HT) roles that are not job-sized regardless of local circumstances.

All leadership roles are allocated a base score to account for the responsibilities typically assigned to a Headteacher, Depute Headteacher or Principal Teacher. The typical responsibilities are those set out in general terms in sections 2.10.1 to 2.13 of the SNCT Handbook.

Job-Sizing was first introduced in the latter part of 2002 and early part of 2003, and forms part of the SNCT terms and conditions. A Toolkit is used for the purposes of determining the salary for any leadership role. SNCT trained local Job Sizing Co-ordinators ensure that job-sizing is applied consistently following approved national guidance.

There must not be any local arrangements that are applied as an alternative to job-sizing. All leadership roles must be sized appropriately.

INTRODUCTION

This document replaces previous guidance issued for the purposes of job-sizing and is intended to provide additional information to support Council Job-Sizing Co-ordinators undertake their role in a consistent manner.

In revising the guidance, last issued in 2019, consideration has been given to the types of enquiries that have been made over time along with changes in Government policy. For example, expansion of universal Free School Meals across Primary stages.

The Job-Sizing Questionnaire and guidance have been updated to reflect changes agreed by the SNCT. The underlying base-score for posts and points awarded have not changed.

The SNCT expects each LNCT to have an agreed policy on how Job-Sizing should be conducted locally. This requires each LNCT to have Job-Sizing Co-ordinators

representing the Council and recognised Trade Unions as set out in the Local Recognition Agreement. All Job-Sizing Co-ordinators must undergo national training provided by the SNCT before undertaking the role. It is important that Job-Sizing Co-ordinators are informed and apply their knowledge consistently. For this reason, Co-ordinators should look to refresh their understanding by attending national training at least once in every three years. LNCTs should maintain a list of their Job Sizing Co-ordinators and a record of the last time each Co-ordinator undertook training.

LNCTs agree Duties and Job Descriptions and procedures to be followed when filling promoted posts. It should be the case that Roles and Responsibilities are broadly similar across all sectors.

When the questionnaire is completed, it should be signed by the Job-Sizing Co-ordinators, and the line manager of the post.

Where there is a current postholder, for instance in the case of re-sizing applications, they will also sign the form, and the postholder should forward the form to the Headteacher to sign. By doing so the Headteacher affirms the information is accurate and that it captures the responsibilities of the post. The claim submitted will require to be evidenced.

When checking the questionnaire Job-Sizing Co-ordinators will require access to whole school information. To enable the timeous sizing of a post the Co-ordinators will require access to current information as part of their due diligence for validation purposes. Such information will include (but not limited to):

- Completed questionnaire (not a Toolkit outcome)
- Last completed questionnaire for the post (if available)
- Staffing information
- Budget information
- School timetable (secondary schools)
- Classification (primary schools)
- Post remit
- School Improvement Plan
- School Calendar

Having checked the data and information provided the Job-Sizing Co-ordinators will sign off the questionnaire, following which the questionnaire will be processed to provide a job sized score.

The Job-Sizing Co-ordinators are authorised to approve the questionnaire after reviewing all required documentation, enabling validation in cases where the line manager or postholder (for re-sizing) decline to sign the form and it is determined that such refusal is an attempt to delay the sizing process. Should this occur, the Co-ordinators can proceed with the job-sizing exercise and notify the post holder and manager of the outcome.

All responsibilities to be job sized must be contained within the remit of the post, and capable of being discharged within the contracted hours for the role.

It is good practice for those involved in the Job-Sizing of a post to familiarise themselves with the content of this document and adhere to the guidance. Any deviation may be subject to challenge at a local or national level.

Job-Sizing Toolkit

When a questionnaire has been validated and signed off by the Co-ordinators, the information will be entered into the Toolkit. The Toolkit is available from the SNCT website and it is advisable that postholders do not download and populate to achieve a particular outcome prior to the questionnaire being validated by the Co-ordinators. The Co-ordinators are trained on the application of the Toolkit and are the best placed to assess the validity of any claim.

The Toolkit is not designed to be used for non-school based roles. Guidance should be sought from the National Co-Ordinators for any role not defined in the SNCT handbook.

SECTION 1: WHOLE SCHOOL INFORMATION

The questions in this section of the questionnaire apply to all posts and must only be completed by the Job-Sizing Co-ordinators and **ONLY AFTER** the claim in sections 2 to 5 has been agreed.

1.1 Council

Enter the name of the Council in which the post is held.

1.2 Names of Job-Sizing Co-ordinators

Enter the names of the Job-Sizing Co-ordinators responsible for **validating and processing** the data relating to the post. Job-Sizing Co-ordinators are selected from both Management and teacher Trade Unions and work together to ensure the process is both transparent and fair.

1.3 Name of School(s)/Service

Enter the name(s) of the school(s) or Service (eg Supported Learning Centre) in which the post is based.

1.4 Type of post

Tick the box to indicate the type of post, ie Headteacher (HT), Depute Headteacher (DHT) or Principal Teacher (PT).

Tick the box if the post relates to responsibilities in more than one school and enter the number of schools. A school is a unique entity with its own SEED code.

Throughout these notes the title PT Guidance/Pupil Support refers to a Principal Teacher post in Secondary with a pastoral/guidance caseload of pupils. Reference should be made to Section 3 which is a guide to the Job-Sizing of a PT Guidance role.

Examples:

A HT who is head of two schools would tick the box and enter 2 against the number of schools.

A PT who is responsible for Additional Support for Learning (ASL) services across a group of six schools would tick the box and enter 6 against the number of schools. Please note that the third box of Q5.3 ("Responsible for remits that require applying promoted responsibilities in other establishments or agencies") should not be ticked for such a post as Q1.4 captures the responsibility for multiple schools.

Tick the box if this is a part-time post and enter the number of hours per week the postholder is contracted to work.

A post which is job shared should be treated as a single, full-time post. There should not be a situation whereby two questionnaires are completed for a promoted post shared by two individuals.

Tick the 1st box if the responsibilities of the post include being a member of the Senior Leadership Team (SLT). An SLT is comprised of a Headteacher, Depute Headteacher or Depute Headteachers, but does not include Principal Teacher roles. PT postholders should not tick that they are members of the SLT. In a school where there is a single DHT the box should be ticked for this post. Where there is only one DHT the second box should be ticked to recognise the responsibilities associated with formally deputising for the Headteacher.

Tick the 3rd box if the SLT includes more than one DHT and in the 4th box enter the number of SLT posts who share the task of deputising.

The retention of a “Formal Depute” in 2005 was intended as a transitional arrangement and took account of the leadership structure in schools at the original introduction of the current Job-Sizing arrangements. At that time, there were both Depute Headteacher (who deputised) and Assistant Headteacher (who did not have deputising responsibilities). The transitional arrangements brought about the removal of the Assistant Headteacher designation and assimilation to that of Depute Headteacher. Where a school has more than one DHT the responsibility for deputising for the HT must be shared between the DHT postholders. In job-sizing terms this is the equalisation of the postholder responsibilities. Reference should be made to Section 2 which is a guide to the job-sizing of a DHT role.

Primary Example:

In a school where there is only one DHT post, tick the 1st box indicating that the postholder is a member of the SLT and the 2nd, indicating that they are the only member of the SLT who formally deputises for the HT.

Secondary Examples: In a school where there are four DHT posts with shared responsibility for deputising for the HT, all should tick the 1st box, none should tick the 2nd box, and all should tick the third box and enter 4 in the 4th box to indicate the number of SLT members in the school, excluding the HT.

1.5 Title of post

Enter the title by which the post is known.

Primary Example:

In a large school where PTs have responsibilities at different stages, the post may be known as “Principal Teacher, Early Education and Childcare”.

Secondary Examples:

In a school where traditional subject posts exist, the post may be known as “Principal Teacher of Mathematics”.

In a school where PTs are responsible for groups of subjects, a post may be known as “Faculty Head - Science” or similar title.

A Principal Teacher with responsibility for the management of the pastoral care of pupils, the post may be known as “Principal Teacher – Pastoral Care” or “Principal Teacher of Guidance” or “Principal Teacher Pupil Support”.

1.6 Name of postholder

Enter the name of the postholder in the case of a resizing application.

If the post is vacant, enter Vacancy.

1.7 Gender of postholder

This information is no longer collected.

Information was gathered as part of the original national sizing exercise and was used for the purposes of data analysis. Including or omitting this information when sizing or re-sizing has no effect on the overall score for the role being sized.

1.8 Payroll Reference Number

Any reference required by the Council when processing the results will be entered by the Job-Sizing Co-ordinators. As an alternative to the payroll reference number the post number could be used for future reference.

1.9 Type of Establishment

Tick the box to indicate the type of school in which the post is located. If the post is in an “other” type of school, describe this in the box provided.

If the post is in a school where there are pupils from 2 – 18, enter the description which is generally used for the establishment.

If the post is in a school (other than an Early Education and Childcare establishment) which has an Early Education and Childcare unit, hub or classes or in a school (other than a **ASN** School) which has an ASL unit, hub or classes, tick the appropriate box(es).

Primary Example:

If a Primary school has Early Education and Childcare class(es), the 1st box should be ticked. If that school also has an ASL unit or hub, both boxes should be ticked.

1.10 School Roll

Tick the box to show the range into which the number of pupils on the roll falls using the census data most recently **published by the Scottish Government**. If the post is vacant and the circumstances in the school will have changed before the appointee takes up post (for example school amalgamations, new Early Education and Childcare provision) the best available estimate should be used, and the rationale documented.

For the purposes of determining the overall Early Education and Childcare roll the number of placed registered with the Care Inspectorate should be used at this time. The Early Education and Childcare roll should only be captured if the Headteacher is the responsible person registered with the Care Inspectorate. This is to allow differentiation between being responsible for Early Education and Childcare provision and not. Across the country, it is recognised that there are different models of provision for delivery in place. Not all Headteachers with an Early Education and Childcare establishment on campus have this responsibility.

In any situation where a role is being re-sized, the school roll must be maintained for two national census data collections before consideration will be given as to whether the provisions of the re-sizing criteria have been met.

1.11 Numbers of Staff

Enter the number of staff that make up the authorised **CORE*** staffing allocation for the school on a Full-Time Equivalent (FTE) basis. The FTE for teachers is based on a 35 hour week. *CORE is defined as the staffing entitled when the local authority

formula / standard is applied, and should excluded any staff FTE from other funding streams. Such staff would normally be appointed on a temporary basis.

In the 1st box, enter the total FTE of HT, DHT and PT postholders in the school.

In the 2nd box, enter the FTE of all other teachers who are **directly line managed** within the school and are part of the school's staffing complement. Councils should also take due account of their own line management arrangements for teachers who work across schools, for example central support for learning. This could involve sharing the responsibility between the HT and a central line manager.

In the 3rd box, enter the FTE of all staff other than teachers who work in the school and who are **directly line managed** within the school. FTEs should be calculated based on the number of hours per week that an equivalent full-time post would normally be contracted to work in that Council.

This would normally include officers/practitioners/educators, office staff, janitors, classroom assistants, auxiliaries etc, who are managed within the school. It would exclude facilities staff or other staff not employed by the Council department responsible for the school or managed by outside agencies, for example, facilities management, catering, janitorial and cleaning staff. Where the postholder has shared management with another officer, eg Business support posts, the LNCT should determine the appropriate FTE (see paragraph 2.1 below).

1.12 Percentage of children in receipt of a School Clothing Grant

The SNCT has agreed that with the introduction of universal Free School Meals that this is no longer an appropriate indicator of deprivation for the purposes of Job-Sizing. The percentage of children in receipt of a School Clothing Grant, as administered by the Council, should be used for the purposes of determining the claim in this section.

Information should be gathered annually by the Council and shared with the Job-Sizing Co-ordinators. It is this information that will be referred to when a post is being sized.

The change from the use of Free School Meals data to School Clothing Grant data cannot be used, at this time, to determine whether there has been a category B change for the purposes of re sizing a post.

1.13 Size of school budget

Enter the total budget for the school. This entry is for reference purposes only.

Tick the box which indicates the range into which the total budget for which the HT is accountable falls, taking into account the following parameters:

The following should be **excluded**:

- Salary costs and other employee costs (for example superannuation and national insurance);
- Costs relating to building maintenance work, including repairs, decoration and improvements, unless devolved;
- Budgets for capital expenditure;
- Special funding from the Scottish Government or other sources, for example PEF or section 23 payments; and
- Monies collected from parents.

The actual budget for which the HT is accountable should be entered in the box provided. Reference should be made to the Devolved School Management document published by the Council.

1.14 The physical nature of the school

Tick the box to indicate the number of pupils for whom transport is provided to school. This should include all pupils using **dedicated school transport** for which the school has responsibility for health and safety. Pupils using local bus services should **not be** included.

The actual number of pupils should be entered in the box provided. This entry is for reference purposes only.

Tick the next box if the school has classrooms on more than one site; a school is on more than one site if it is necessary to leave school premises to move from one geographical location to another. For example, year groups being taught across two or more separate locations in dedicated school buildings not considered to be on the same campus. The box should only be ticked if the HT is responsible for more than one site. Schools that have sports facilities or other specialist facilities on different sites should not be treated as multi-site schools for this purpose.

SECTION 2: RESPONSIBILITY FOR THE LEADERSHIP, GOOD MANAGEMENT AND STRATEGIC DIRECTION OF COLLEAGUES

Throughout this section HTs receive an automatic score based on the whole school data. All questions in this section should be completed for DHT and PT posts. For HT posts only question 2.4 may be completed.

Direct line management responsibility for teaching staff

Please include all teaching staff for whom the post has direct line management responsibility.

An individual has line management responsibility when they are formally designated to oversee and manage the performance and development of staff within a department, faculty, or unit. This encompasses:

- Strategic Oversight: Leading the planning and execution of departmental or faculty improvement plans in alignment with the school's overall improvement strategy;
- Staff Development and Performance: Conducting Professional Review and Development (PRD) processes, facilitating Career-Long Professional Learning (CLPL), and ensuring continuous professional growth of team members;
- Operational Management: Implementing Council policies related to absence management, disciplinary procedures, and competence frameworks, ensuring adherence to established standards and protocols; and
- Quality Assurance: Maintaining and achieving standards and quality indicators as set by the school and Council.

Responsibilities limited to classroom supervision, mentoring without formal accountability, or leading specific projects without overarching management duties do not constitute line management responsibility.

A claim can be made in section 5.2 if the postholder has responsibility for leading or working with colleagues in the same establishment. The postholder should be able to evidence this claim and identify the responsibilities.

Where the line management of staff is shared with another promoted post then the number of staff line managed by the postholder, on a pro rata basis (FTE), should be included. Double counting of staff is not permitted.

During registration, where appropriate, guidance/pastoral care staff have responsibility for pupils for whom they are credited in caseload. This does not assume line management of register teachers. However, guidance/pastoral care staff may have responsibility for programmes of Personal, Social and Health Education (PSHE). As such they will have responsibility for the curriculum and responsibility for directing teachers in class work, for pupil discipline in those classes and may contribute to the Career-Long Professional Learning (CLPL) review of those who teach PSHE programmes. This can be accounted for in section 5.2 subject to the principle of the double counting.

Part-time staff should be calculated based on the number of hours per week that an equivalent full-time post would normally be contracted to work (35 hours for teachers) and entered as a proportion of this time. The same applies to staff who are also line managed by more than one promoted postholder.

If the FTE figure falls between the bands, round up to the nearest whole number.

If there is no direct line management responsibility for teaching staff a tick should be placed in the 'none' box in both columns.

Probationers should be counted as full-time teaching staff, for instance 1.0 FTE, provided that the FTE is included in the CORE staffing allocation, and not an additional allocated resource.

Tick the relevant box in the 1st column for the total number of staff and then tick a box in the 2nd column for actual FTE in order to reflect any part time staff or those staff who are line managed on a pro-rata basis.

The actual FTE should be entered in the box provided. This entry is for reference purposes only.

Primary Example:

A DHT has responsibility for Developing the Curriculum and Monitoring Learning and Teaching for P1 to P3 where there are 4 classes, 2 of which have job-share teachers. Under "Total Number of Teaching Staff" the 6 to 10 box should be ticked (4 job sharers and 2 full-time staff) and under "FTE" the 2 to 5 box (4 FTE) should be ticked.

Secondary Examples:

If a DHT were responsible for 4 PTs, each of whom is responsible for 3 full-time classroom teachers, the total number of staff for whom the DHT has direct line management responsibility would be 4. Each PT would have direct line management responsibility for 3 staff.

If a curricular PT has a PT Guidance/Pupil Support working 0.4 FTE in the department as a class teacher and the PT Guidance/Pupil Support also does 0.6 FTE in the Guidance/Pupil Support role under the leadership of a DHT, the Department PT would line manage that person for 0.4 FTE and the DHT would line manage that person 0.6 FTE. This is assuming that the DHT and PT have overall responsibility for the work carried out by the PT Guidance/Pupil Support when working for each department.

A DHT who has no requirement to teach should not be counted. However, a DHT with a teaching commitment, within a department or faculty, should be accounted for. For example, a DHT timetabled to teach in their own subject will be line managed by their PT for the period of time that they are teaching. If timetabled for 0.4FTE across the week, then this FTE is included in the overall FTE managed by the PT.

The details section should be completed with the name/designation of staff line managed.

To manage other staff

As for 2.1 above but with respect to support staff for which the postholder has direct line management responsibility. 'Other staff' includes all support staff, for example, pupil support assistants, classroom assistants, auxiliaries, etc. Only those staff who are line managed by a promoted postholder in the school and are employed by the Council service running the school should be counted.

FTE of support assistants (and other school support staff) should be calculated based on the number of hours per week that an equivalent full-time post would normally be contracted to work and entered as a proportion of this time. For the purposes of job-sizing full-time hours are considered to be 35 per week.

Learning support staff, classroom assistants or pupil support assistants when they are working in the classroom should not be counted as 'line managed' unless there is

overall responsibility for line management of them. Credit for this would normally be given in Question 5.2.

Posts such as instrumental music instructors, technicians and librarians, may not be managed within the school at all, although they may be managed partly by a promoted postholder within a school and partly by a centrally based manager or co-ordinator. Job-Sizing Co-ordinators should be informed of how this sharing operates and the percentages or decimal fractions to be allocated to postholders for this responsibility. Within some Councils such arrangements may have been agreed within the LNCT. Where this is not the case the LNCT must be notified of the arrangements for shared management.

Only when the total FTE figure falls between the bands, should the FTE be rounded up to the nearest whole number.

Tick the relevant box in the 1st column for the total number of other staff and then tick a box in the 2nd column for actual FTE in order to reflect any part time staff or those staff who are line managed on a pro-rata basis.

The actual FTE should be entered in the box provided. This entry is for reference purposes only.

Note: All examples are dependent on arrangements existing in Councils.

Primary Examples:

A DHT in a Primary school has responsibility for 1 violin instructor and 2 guitar instructors working in the school for 7 hours each per week, total number of hours is 21/0.6 FTE. This figure may be allocated proportionately. For example, if a person from the Council has 60% line management responsibility for Instrumental Music Instructors then 40% of the FTE of the time worked in the school may be allocated to the DHT. Therefore, under "Total Number of Staff" column, the 2 to 10 box should be ticked (3 people) and under "FTE" the 2nd box should be ticked (0.6 FTE @ 40% = 0.24 FTE, rounded up to the nearest whole number = 1). This example may also apply in the Secondary sector.

A PT has responsibility for 1 Clerical Assistant (35 hours) and 5 Support Assistants (25 hours/0.71 FTE each). Under “Total Number of Staff” the 2 to 10 box should be ticked (6 staff) and under “FTE” the 2 to 10 box (4.55 FTE).

Secondary Examples:

PT Science has 3 Technicians working in the department. The PT shares the responsibility for line management of them with a Council manager on a basis of 40% managed by the PT Science and 60% managed by the Council manager. Therefore, under the “Total Number of Staff” column the 2 to 10 box should be ticked (3 people) and under “FTE” the 2 to 10 box should be ticked (3 FTE @ 40% = 1.2 FTE, which is rounded up to 2 FTE as it falls between bandings). Where a Council manager has full line management responsibility for Technicians, the ‘None’ box should be ticked. Depending on circumstances it may be appropriate of the PT to claim for leading the work of colleagues in question 5.2.

A DHT is responsible for 2 Instrumental Music Instructors with a combined FTE of 0.4 in the school, and also for a full-time Clerical Assistant working 35 hours (1.0 FTE). There are 3 members of staff so under the “Total Number of Staff” column the 2 to 10 box should be ticked. The FTE of the 3 staff is 1.4. This falls between the 1 option and the 2 to 10 option. Under “FTE” the 2 to 10 box should be ticked. Rounding up only applies if the total FTE that is calculated falls between options or bandings.

Foreign language assistants will not normally be deployed for a complete school session. In addition, they may be working across schools in different local authorities. Direct line management is also likely to take place at local authority level. Foreign language assistants will be temporarily deployed and are unlikely to form part of a school’s CORE staffing entitlement. For these reasons they are not included for the purposes of job-sizing.

Note: All FTEs in examples are based on a 35 hour week.

The details section should be completed with the name/designation of staff line managed.

2.3 Accountability for budgets

Tick the relevant box for the amount of regular annual budget for which the post is accountable. Accountable budget holders are required to comply with their Council/Service policy and procedures with regard to financial management and co-operate with audit requirements. Having accountability for a budget is not merely keeping a tally of expenditure but rather being liable for the management of allocated monies.

HTs are accountable for the whole school budget, and the HT may delegate parts of this budget to other promoted postholders. It is not possible for more than one other promoted postholder to be accountable for the same monies.

Budgets for capital expenditure or temporary funding from the Scottish Government or other sources should **not be** included. Monies collected from parents and other special funding arrangements should also be excluded. School funds, trust funds etc.

The actual budget should be entered in the box provided. This entry is for reference purposes only, carries no weighting and is necessary for the Job-Sizing Co-ordinators to undertake due diligence.

Primary Example:

The HT may delegate some budget to DHT or PT postholders, for example for the year groups / curricular areas that they manage. In a small school, the DHT may be given responsibility for some or all subject-related budgets.

Secondary Example:

The HT may delegate some budget to a DHT, for example school cover budget, ICT or CLPL. The HT may also delegate some per capita budget to PTs to make them accountable for the budgets for their respective departments/faculties. Funds for the purpose of paying Qualifications Scotland fees, invigilators, supported study (or similar), Easter school etc. are to be excluded.

2.4 Responsibility for health and safety, and wellbeing

All promoted postholders have responsibility for health and safety, and wellbeing (staff/pupils) and a base score has already been awarded for this from the information provided in Section 1. A claim in this section is permitted where the postholder has

additional responsibility for undertaking risk assessment in accordance with the Council's policies and advising staff accordingly.

Tick the 1st box if the post has **direct curricular responsibility** for any of the subjects listed where the postholder has specific responsibility for developing/preparing risk assessment templates for use by colleagues in accordance with school/services policy. This will most likely be the subject PT, but it could be a DHT in a smaller school or PT post in a Primary school (with curricular responsibilities for any of the listed subjects) and will include direct responsibilities, for example, for developing risk assessments. This box cannot be ticked for a HT post.

Tick the 2nd box if the post has other direct curricular responsibilities for health and safety, for instance PT posts for subjects not listed at the 1st box but also carrying similar responsibilities. PT posts with whole school responsibility for a subject will tick one of the first two boxes. This box cannot be ticked for a HT post.

Tick the 3rd box if the post has health and safety responsibilities, including wellbeing, for year groups and / or specialist sections of the school. This box cannot be ticked for a HT post. An example for a claim for wellbeing might be having responsibility for specific intervention/strategy for wellbeing and resilience to promote staff and pupil wellbeing, a wellbeing and resilience program, staff and pupil wellbeing.

Tick the 4th box if the post has overall responsibility for health and safety for the whole school. If the HT post has responsibility as the school's Health & Safety Officer, and this responsibility has not been delegated to another promoted post, then this box should be ticked. This is the only box that can be ticked for HT posts. This box can only apply to one promoted post in the school.

Primary Examples:

A DHT / PT in a Primary school with curricular responsibility for environmental studies would have direct curricular responsibility for health and safety for that subject and would enter a tick in the 2nd box.

A DHT or PT postholder who is head of P1 and P2 in a Primary school would enter a tick in the 3rd box as being responsible for health and safety, including wellbeing, for these year groups.

Secondary Examples:

For a PT Science post the 1st box may be ticked. The recorded reason may be, but is not limited to, annual review/preparation of risk assessments used by departmental staff.

For a PT Guidance/Pastoral Support post the 2nd box may be ticked. The recorded reason may be, but is not limited to, the wellbeing responsibilities associated with the caseload and evidence provided.

For a DHT post with health and safety, including wellbeing, responsibilities for S3 and S4 the 3rd box may be ticked. Details of house/year group responsibilities must be provided.

SECTION 3: RESPONSIBILITY FOR CURRICULUM DEVELOPMENT AND QUALITY ASSURANCE

3.1 To review the CLPL needs, career development and performance of colleagues

There is no need to enter any information for this item as a score will be calculated automatically based on the number of staff directly line managed by this post and entered in 2.1 and 2.2. Other responsibility for CLPL (eg, a school's CLPL Co-ordinator) should be recorded in 5.2.

3.2 To produce and implement the school improvement plan and responsibility for whole school policies

This question is for DHT and PT posts only. For HT posts, this responsibility is scored automatically based on whole school data.

You can make an entry in this question if you have **sole responsibility** to produce and lead the implementation of an improvement plan or a section of one, and also if you have **sole responsibility** for producing, leading and reviewing certain whole school policies, whether or not they are under review in the improvement plan, at the time of sizing, but where it can be evidenced that the postholder has the responsibility (4th box). These might include, but are not restricted to: Learning, Teaching and Assessment; Reporting to Parents/Carers; Homework; Relationships/Behaviour/Bullying; Curriculum, including literacy/numeracy/HWB; Support for Learning/ASN/Inclusion/Equality; Child Protection/Safeguarding/Pupil

Support; Qualifications Scotland Presentation and Verification (Secondary schools); Professional Learning (Staff); Attendance; Self-Evaluation; Digital Technologies/AI; Uniform; Staff absence cover.

Tick the box/boxes to indicate the area on which the plan will have impact. More than one tick is possible, depending on the remit for the post.

Details must be given of the specific responsibilities in relation to this post in the text box.

Example:

For a DHT post in any sector with **sole responsibility** for pastoral care and also for the production of the whole plan, tick the 2nd and 4th boxes. If the DHT post is also in charge of certain whole school policies, then this is already covered by the tick placed in the 4th box.

Primary Example:

For a DHT post with sole responsibility for the curricular areas of Mathematics across all stages and also for the entire curriculum of P6 and P7, tick the 1st box and the 3rd box.

Secondary Examples:

A subject or faculty PT solely responsible for the improvement plan, in their subject or faculty, tick the 1st box.

For a PT or DHT post with **sole responsibility** for an improvement plan for Support for Learning, tick the 3rd box. Only one postholder can tick this box.

For a PT Guidance/Pupil Support post with sole responsibility for a section of the improvement plan dealing with an aspect of pupil support, tick the 2nd box. If, in addition, the PT has sole responsibility to develop, lead and review the whole school policy on Health and Wellbeing, then the 4th box should also be ticked.

3.3 To develop the curriculum and monitor learning and teaching

This question may be answered by a HT (Primary only), DHT or PT posts, provided the postholder has direct responsibility for the **development of the curriculum** of the classes shown and for **monitoring learning and teaching** in these classes

PRIMARY

Enter the number of timetabled classes for which the post has **direct** responsibility.

There is no facility to enter subjects or qualifications, only the number of classes. Some classes may be composite. If this is so, decimals may be used to show the proportion at each stage. Some posts may be responsible for the entire curriculum at certain stages. However, other posts may be responsible for a curricular area for all or some stages. In such cases, decimals may be used to reflect the proportion of the curriculum involved. In all cases, including the use of decimals, the total across all promoted posts must be equal to the number of agreed classes in the school. Agreed classes are the number of classes that the Council has agreed to be formed at the time of the annual staffing exercise and for which CORE staffing has been allocated. Classes formed using temporary funding (e.g. PEF) are to be excluded.

Primary Examples:

In Early Education and Childcare when completing section 3.3 of the questionnaire only a morning and afternoon session can be claimed for if delivery is for the full day. The maximum claim is 2, or 1 if only morning or afternoon sessions are delivered.

For a PT post responsible for the entire curriculum of P1-3 in a school with 2 x P1 classes, a P2 class, P2/3 composite (one third P2 and two thirds P3), and a P3 class, enter P1 – 2, P2 – 1.3, P3 – 1.7 (total 5 classes).

A DHT responsible for Language and Expressive Arts across all stages in a school where Language accounts for 25% of the curriculum and Expressive Arts for 15%, is in charge of 40% of the curriculum. The total shown should amount to 0.4 of the total number of classes in the school, spread appropriately over all stages and being the equivalent of 0.4 per class.

In a school with a class structure of 2 x P1, 1 x P2, 1 x P2/3 (half P2, half P3), 2 x P3, P4, P5, 1 x P6 and 1 x P7, the entries should be: P1 – 0.8, P2 – 0.6 (0.4 for the straight P2 plus 0.2 for half of the P2/3), P3 – 1.0 (0.4 for each straight P3 plus 0.2 for half of the P2/3), P4 – 0.8, P5 – 0.8, P6 – 0.4, P7 – 0.4. The total is 4.8. It can be checked by taking 0.4 of the school's total of 12 classes (=4.8).

An alternative approach, avoiding the use of decimals, is to enter the number of classes that a promoted postholder is responsible for against any year group. The toolkit will generate the same number of points. For example, a Headteacher with responsibility for 25% of the curriculum across P1 to P4 could enter 1 in any of these stages rather than 0.25 in each. Please remember that the claim is for developing the curriculum and monitoring learning and teaching not either/or.

SECONDARY

The curriculum is likely to be directly managed by PTs, and only rarely by DHTs or HTs, for example, in smaller Secondary schools. Entries should be made under 5 headings; Names of Timetabled Subjects; Number of Subjects; Level of National Qualification; Number of National Qualifications (NQs) and Number of timetabled classes of discrete class groups.

Only National Courses, National Qualifications, National Certificates and National Progression Awards detailed in the Qualifications Scotland NQ Catalogue can be claimed in this section. In relation to National Qualifications, only National Courses (unit-based awards), National Certificates and National Qualifications count in this column. National Progression Awards can be included if the course duration is timetable across the school year, but not if timetabled for only part of the year. Each level should be counted only once and placed against the year group with the biggest presentation. The job-sizing Co-ordinators will ask to see details of the number of students presented in each year group to validate the claim.

For PT Support for Learning the number of timetabled classes box **must not** be completed, instead an entry should be made in question 3.4 in the 5th box. However, entries may be made for subjects and qualifications.

Subjects

A subject is a complete, distinct recognisable course of study. It may be made up of individual units or topics, but these individual parts are not themselves considered subjects. If in doubt, reference can be made to the Qualifications Scotland catalogue (or similar publication) of National Courses, National Certificates and National Qualifications. Skills for Work, ASDAN and Duke of Edinburgh may be included each being counted as one subject as long as they are timetabled within the school day.

Certain subjects in S1 and S2, for example Science, Technical, and Social Subjects should be considered to be 1 subject, even if they comprise units from different parts of the curricular area. From S3 the number of timetabled subjects may be counted separately although National Qualification levels cannot be accounted for before Senior Phase.

Some subjects, for example, RME and PE, have a general course (for all pupils) as well as specialist courses beyond BGE. Even so, they should be considered to be offering only 1 subject for each year group.

Give the names of the subjects and the number of subjects taught in each year group. Count S5 and S6 together if these pupils are timetabled together as a class group albeit studying at different levels. For example, if 3 subjects are taught to mixed classes of S5 and S6, then record 3 subjects against either S5 or S6, but not both. Use decimals to show shared responsibility. For example, if responsibility for an S1/2 course in science is shared equally amongst a PT Biology, a PT Chemistry and a PT Physics, then show this as 0.33 under number of subjects, along with the number of classes.

National Qualifications (NQs)

Only National Courses (collections of units), National Certificates and National Qualifications count in this column. Individual units do not. Each level should be counted only once and placed against the year group with the biggest presentation. Example, below:

A PT English is responsible for 8 classes in S1, 7 classes in S2, 6 classes in S3, 7 classes in S4 studying towards National 3, National 4 and National 5, 5 classes in S5 studying towards National 5 and Higher and 3 classes in S6 studying towards Higher and Advanced Higher.

This would be recorded as follows:

Year	Names of timetabled Subjects	Number of Subjects	Level of National Qualification (NQ)	Number of NQs	Number of Timetabled Classes
S1	English	1			8

S2	English	1	BGE		7
S3	English	1			6
S4	English	1	N3,N4,N5	3	7
S5	English	1	Higher	1	5
S6	English	1	Advanced Higher	1	3

Each level of NQ, Higher and Advanced is credited once although offered in different year groups.

Care should be taken when considering faculty heads where there are also PTs to ensure double counting does not occur.

The Qualifications Scotland website ([Qualifications Scotland | Scotland's Awarding and Accreditation Body | Qualifications Scotland](#)) sets out details of subjects in the catalogue. Units are not normally awards but can be a separate subject. Some awards are not delivered by Qualifications Scotland but can count subject to the following criteria:

- i. that there is a requirement for the teacher to carry out bureaucratic work related to the exam;
- ii. that the subject is timetabled (e.g. Sports Leadership Award, Caritas Award (SCES), ASDAN, Duke of Edinburgh Award) during pupil hours and not extra-curricular.

National Progression Awards (NPA)

NPAs can be included if the award level is SCQF level 4-6. Examples might be: Business and IT, Cyber Security, Digital Passport, Events, Legal Studies, Musical Theatre, and Sound Production. Single units cannot be claimed. The NPA must be timetabled across the school year and not a single term.

Timetabled classes

Enter the number of separately identifiable class groups appearing on the school or departmental timetable in each year. In a school with 8 classes in S1 taking 3 subjects within the same faculty, the entry would be 8, not 24. This is because the same group of pupils takes all 3 subjects. After subject choices have been made, the pupil groupings are likely to be different for the 3 subjects and should be counted separately.

Responsibility for some classes may be shared. For example, 3 PTs may share a Science course in S1. The number to be entered in this column will depend on how the sharing is done. If 12 classes are organised on a rotational basis attending Biology for 3 months, Chemistry for 3 months and Physics for 3 months, then the entry would be 4 (with a corresponding entry of 1 in the subject column) as the subject is taught to 4 classes at any one time. However, if the classes are following an integrated Science course with no rotation involved and each PT is responsible for one third of the course, then the entry would be 12 but the subject column would only show 0.33.

Mixed classes of S5 and S6 are common. Simply count the total number of classes across S5 and S6 in the curricular areas concerned. They can be divided between S5 and S6 if so desired without affecting the score.

Secondary Examples:

A PT of RME post is responsible for:

- S1 - 7 classes;
- S2 - 8 classes;
- S3 - 8 core RE classes and 2 NQ classes;
- S4 - 7 core RE classes and 2 N5 classes;
- S5/6 - 1 Higher class and 1 N5 class.

This would be entered as:

Year	Names of timetabled Subjects	Number of Subjects	Level of National Qualification (NQ)	Number of NQs	Number of Timetabled Classes
S1	RME	1			7

S2	RME	1	BGE		8
S3	RME	1			10
S4	RMPS	1	N5	1	9
S5/6	RMPS	1	Higher	1	2

The subject names and NQ levels names should also be entered in the appropriate columns.

A PT post covering both Biology and Chemistry has the following responsibilities:

- S1 - shared responsibility with another PT for an integrated science course for 12 classes;
- S2 – shared responsibility with another PT for an integrated science course for 12 classes;
- S3 - 3 biology and 2 chemistry classes, with both subjects offered at N4 and N5;
- S4 - 4 biology and 3 chemistry classes, with both subjects being offered at N4/5;
- S5/6 – 2 mixed S5/6 classes in H biology, 1 mixed S5/6 class in N5 biology, and 1 mixed S5/6 class in N5 biology, plus in chemistry 1 mixed S5/6 classes at Higher and 1 mixed S5/6 composite N5 class;
- S6 - 1 class in either Advanced Higher Biology

This would be entered as:

Year	Names of timetabled Subjects	Number of Subjects	Level of National Qualification (NQ)	Number of NQs	Number of Timetabled Classes
S1	Science	0.5	BGE		12
S2	Science	0.5			12
S3	Biology, Chemistry	2			5

S4	Biology, Chemistry	2	N4,N5	4	7
S5	Biology, Chemistry	2	Higher	2	6
S6	Biology	1	Advanced Higher	1	1

The subject names and NQ levels names should also be entered in the appropriate columns.

A school timetables the 3 social subjects in S1 and S2 on a rotational basis. Each social subject has its own PT. There are 9 classes in S1 and in S2. In each year group, the PT History post has responsibility for 3 classes at any one time for one third of the school year. In S3 and S4 there are 4 History classes working towards national 4 and national 5. In S5 and S6 there are 2 classes working towards Higher and Advanced Higher. The numerical entries to be made in the table for S1 and for S2 would be:

Year	Names of timetabled Subjects	Number of Subjects	Level of National Qualification (NQ)	Number of NQs	Number of Timetabled Classes
S1	Social Subjects	1	BGE		3
S2	Social Subjects	1			3
S3	History	1			4
S4	History	1	N4, N5	2	4
S5/6	History	1	Higher, Advanced	2	2

In a school there are 10 PT Guidance/Pupil Support and each contributes a 4 week unit (10% of the course) to the PSHE course for each year group. There are 10 classes in each of S1 to S5/6 (combined). In the number of subjects column 1 should be entered, for S1 to S5, and in the number of timetabled classes column, for S1 to S5,

1 class should be entered, representing 10% of the total number of classes in each year group.

This would be entered as:

Year	Names of timetabled Subjects	Number of Subjects	Level of National Qualification (NQ)	Number of NQs	Number of Timetabled Classes
S1	PSHE	1	BGE		1
S2	PSHE	1			1
S3	PSHE	1			1
S4	PSHE	1	-	0	1
S5	PSHE	1	-	0	1

A PT Support for Learning works alongside subject PTs and other colleagues in supporting pupils' attainment. Normally the responsibility for the presentation of pupils for National Certificates / Awards is that of a subject PT and only in exceptional circumstances that of the PT Support for Learning.

If a PT Support for Learning has **sole responsibility** for the curricular materials and quality of learning and teaching for a separately timetabled group of pupils in S1 to S4 leading to presentation for English at N2 and N3 then a 1 should be entered in the subject column for both S3 and S4 (where the responsibility for the subject is not shared with a PT English) and a 2 should be entered in the National Qualifications column for S4. No entry should be made in column for number of timetabled classes. The class responsibility is covered in question 3.4 and the box "Responsible for an ASL unit, hub, class or group for which no other promoted postholder is responsible" should be ticked.

Year	Names of timetabled Subjects	Number of Subjects	Level of National Qualification (NQ)	Number of NQs	Number of Timetabled Classes
S3	English	1			
S4	English	1	N2,N3	2	

3.4 Other formal management responsibilities

This question is only for DHT and PT posts. It is likely to apply mostly to DHT posts.

A list of formal management responsibilities is given, mostly on a whole school basis. Any boxes applying to a post should be ticked if the post carries **sole responsibility** for the area described. In other words, for each responsibility given, only one post can receive credit for it. The only exception is the box for Learning and Behaviour Support where two posts may be credited, one for Learning Support and the other for Behaviour Support. It is possible that no boxes will be ticked in this section, particularly for PT posts.

Give details of the specific responsibilities in relation to this post in the text box.

Primary Examples:

A DHT or PT post with responsibility for whole school digital learning and innovation to support teaching and learning, identified in the school improvement plan, should tick the 2nd box. For example, the development of strategies to promote digital curriculum innovation, ensuring that classroom teachers are up-skilled in digital learning innovation that can be applied in their classroom practice. Only one postholder in a school can claim this responsibility. This box should not be ticked if the responsibility relates to the purchase of ICT equipment, password/access allocation or reset, school GLOW or SEEMIS contact, responsibilities for the school social media, etc.

A DHT with responsibility for the day-to-day management of an Early Education and Childcare provision within a Primary school setting should tick the 3rd box. Only one

postholder in a school can claim this responsibility. In such circumstances the Headteacher will be the named manager with the Care Inspectorate.

A DHT with responsibility for relationship/behaviour support or learning support for the whole school should tick the 4th box. Only one postholder can claim either responsibility.

Secondary Example:

A DHT with responsibility for whole school timetabling, and associated tasks, should tick the 1st box. Only one postholder in a school can claim this responsibility.

A postholder, most likely to be a DHT, with responsibility for whole school digital learning and innovation to support teaching and learning as can be identified in the school improvement plan should tick the 2nd box. For example, this would include the development of strategies to promote digital curriculum innovation, ensuring that classroom teachers are up-skilled in digital learning innovation that can be applied in their classroom practice. Only one postholder in a school can claim this responsibility. This box should not be ticked if the responsibility relates to the purchase of ICT equipment, password/access allocation or reset, school GLOW or SEEMIS contact, responsibilities for the school social media, etc.

A DHT with responsibility for the overall management and strategic direction of Support for Learning should tick the 4th box. The postholder may or may not have line management responsibilities for a PT Support for Learning. In a school where the PT Support for Learning has the overall responsibility for the management and strategic direction of Support for learning then they should tick the 4th box. Where there is both a DHT and PT then the PT should tick the 5th box. Only one postholder in a school can claim responsibility by ticking the 4th or 5th box.

A PT with distinct responsibility for Behaviour/Relationship Support or Learning Support across the whole school should tick the 4th box. Only one postholder in a school can claim either area of responsibility. DHTs with house group responsibilities should claim in 4.1.

Note that only one Job-Sizing questionnaire form is completed for the PT of Guidance/Pupil Support role, because it is one role with multiple postholders having shared responsibilities. In recognition of the additional management responsibilities

associated with this role, the 6th box should be ticked. No other designation is permitted to claim this responsibility.

3.5 Timetabled teaching time

This question may be answered for HT, DHT and PT posts. Job-sizing Co-ordinators will ask for a copy of the school timetable / primary classification and teacher allocation to validate any claim for teaching time.

Enter, to the nearest hour, the weekly timetabled class teaching commitment which is undertaken as a **requirement of the post**.

A PT Support for Learning may be timetabled to support pupils for 18 hours a week and it would be appropriate to enter this. Teaching blocks or periods should be converted into hours. In many cases, the actual class commitment will vary year to year. A typical or average figure should be entered if this is the case.

A post which is held on a job share basis should include the combined class teaching commitment of both job share postholders.

HTs should not make an entry here if the staffing standard of the school does not compel them to be class teachers but they choose to do some teaching.

SECTION 4: RESPONSIBILITY FOR WHOLE SCHOOL POLICY AND IMPLEMENTATION

All promoted posts have a responsibility for whole school policy and its implementation. All posts are awarded a base score for this responsibility which is calculated from the whole school data.

Questions in this section may be completed for DHT and PT posts only.

4.1 To develop, manage and implement a policy on pupil behaviour/respectful relationships

This question should be completed for a DHT or PT post with **specific responsibility** for the management of behaviour/positive relationships policy of the whole school or for a year group or specialist section of the school. It should **not** be completed for PT posts with only curricular responsibility. It is a general responsibility for subject PTs to implement the school's disciplinary arrangements and behaviour/relationship policy at

departmental/faculty level and, therefore, a claim for this cannot be made under 4.1 or 4.2.

For posts of PT Guidance/Pupil Support this question will not normally be completed except where there are specific whole school responsibilities in the remit for the post.

Examples:

For a DHT or PT post with responsibility for the whole school pupil behaviour/positive relationship policy and disciplinary procedures, the 2nd box should be ticked.

For a DHT post with responsibility for behaviour management and positive relationships of a specific stage, year group or section of the school, the 1st box should be ticked.

For a PT post with specific responsibilities for behaviour management and positive relationships of pupils within a specialist section of the school or year group, the 1st box should be ticked but not if the responsibilities are exclusively curricular.

Give details of the specific responsibilities in relation to this post in the text box below remembering that the claim in this section is for the development, management and implementation of a policy.

4.2 To develop, manage and implement a policy on guidance, pupil support, pastoral care and pupil welfare

This question should be completed for a DHT post with responsibility for developing, managing and implementing specified whole school policies in this area, or in relation to a year group or section of the school.

This question should be completed for a PT post with responsibility for a formal guidance/pastoral caseload or for policies related to pastoral care and pupil welfare for a specialist section of the school.

The “Formal Guidance” caseload is applicable only to Secondary Principal Teachers of Guidance posts (the nomenclature may vary across Council areas) and cannot be claimed by any other postholder.

In circumstances, where for example, in a small rural school there are over-arching responsibilities and a DHT post has a guidance caseload a claim can be made, but only if there is no PT making a similar claim with the school.

This section should not be completed for PT subject /curriculum posts.

Give details of the specific responsibilities in relation to this post in the text box.

The actual number of pupils in the caseload should be entered in the box provided. This entry is for reference purposes only and should not routinely exceed 200. Within a school session, the caseload may increase to accommodate pupils that have registered after the school year has started. This is short term and must be addressed for the following year. A caseload of 180 pupils is considered ideal.

Example:

For a DHT post with specific responsibilities for whole school policies in this area, the 3rd box should be ticked.

Secondary Examples:

For a formal PT Guidance/Pupil Support/Pastoral Care post, the 1st box should be ticked.

For a PT Support for Learning (or PT Additional Support Needs) post which carries with it full guidance and pastoral care responsibilities for specific pupils, the 1st box should be ticked.

The 2nd box should be ticked for a DHT post with responsibility for developing, managing and implementing specified whole school policies in this area, or in relation to a year group or section of the school.

4.3 To develop, manage and implement a policy on pupil assessment

This question should be completed for a DHT post with whole school responsibilities for pupil assessment or a DHT or PT post with responsibilities for pupil assessment within a department or curricular area or in relation to a year group or specialist section of the school.

Give details of the specific responsibilities in relation to this post in the text box.

Examples:

For a PT Subject/Curriculum post with lead responsibilities for pupil assessment within a subject department or specific curricular area, the 1st box should be ticked.

For a DHT or PT post with lead responsibilities for Broad General Education and/or Senior Phase assessment, the 2nd box should be ticked.

For a DHT post with Qualifications Scotland Co-ordinator responsibilities (Secondary), the 3rd box should be ticked.

SECTION 5: RESPONSIBILITY FOR WORKING WITH PARTNERS

All promoted posts have a responsibility for working with partners. All posts are awarded a base score for this responsibility which is calculated from the whole school data.

Questions in this section may be completed for DHT and PT posts only.

5.1 To work with parents/carers

Only complete this section if the post carries **additional** responsibilities not captured by other questions.

Tick the 1st box if the post has sole responsibility for a remit not captured elsewhere that involves working with parents on behalf of groups of pupils, but not across the whole school.

Tick the 2nd box if the post has sole responsibility for a remit not captured elsewhere that involves working with parents across the whole school.

Tick both boxes if some remits involve the parents of groups of pupils, and other remits involve working with parents across the school.

Give details of the specific responsibilities in relation to this post in the text box.

All promoted postholders have a responsibility for working with parents/carers and, therefore, this box should only be ticked if there is an **additional specific responsibility** linked to the school improvement plan.

Primary Example:

For a Primary DHT post with responsibility for P4-7 literacy workshops for parents, the 1st box should be ticked. If, in addition, this post has responsibility for working with parents across the whole school, for example, through enterprise activities, then the 2nd box should also be ticked.

Secondary Example:

For a DHT post with responsibility for delivery of workshops or seminars to parents/carers of S3 and S4 pupils in relation to health and wellbeing issues, the 1st box should be ticked. If, in addition, this post has responsibility for working with parents across the whole school, for example, on mental health issues, then the 2nd box should also be ticked.

A PT Pupil Guidance/Pupil Support post carries a responsibility to co-ordinate the issue of careers across the whole school and is required to work with parents on this basis. As this responsibility is not captured by other questions, the 2nd box should be ticked.

5.2 To lead or work with colleagues in the same establishment

Only complete this item if the post carries **additional** responsibilities not captured by other questions.

Tick the 1st box if the post has sole responsibility for a remit not captured elsewhere that involves leading or working with colleagues on behalf of groups of pupils, but not across the whole school.

Tick the 2nd box if the post has sole responsibility for a remit not captured elsewhere that involves leading and working with colleagues across the whole school.

Tick both boxes if some remits involve leading and working with colleagues on behalf of groups of pupils, and other remits involve leading and working with colleagues across the school.

Give details of the specific responsibilities in relation to this post in the text box.

Example:

For a PT post in any sector with a remit in raising achievement across the whole school, the 2nd box should be ticked (if responsibility is not captured elsewhere).

Primary Examples:

For a DHT post which includes the Staff Development Co-ordinator role where the remit is likely to involve working with staff across the whole school, the 2nd box should be ticked.

A DHT post with responsibility for literacy across the school is required to lead and work with all staff on this issue would merit a tick in the 2nd box.

Secondary Example:

A PT post with a permanent role in leading staff groups for specific purposes identified within the school improvement plan would merit a tick in the 1st box.

5.3 To work with other establishments and agencies

Only complete this item if the post carries **additional** responsibilities not captured by other questions.

Tick the 1st box if the post has sole responsibility for a remit that involves working with other establishments and agencies on behalf of groups of pupils, but not across the whole school.

Tick the 2nd box if the post has sole responsibility for a remit that involves working with other establishments and agencies on behalf of pupils across the whole school.

Tick the 1st and 2nd boxes if some remits involve working with other establishments and agencies on behalf of groups of pupils and if other remits involve working with other establishments and agencies on behalf of pupils across the school.

Tick the 3rd box if the post carries promoted responsibilities that impact on other establishments or agencies.

Give details of the specific responsibilities in relation to this post in the text box.

Primary Example:

For a DHT post with responsibility for Early Education and Childcare transition or Primary – Secondary transfer, tick the 1st box.

Secondary Examples:

For a PT post responsible for Employability and Skills/Developing the Young Workforce in all year groups, tick the 2nd box.

A PT Guidance/Pupil Support post with responsibility for pupils healthcare needs (non-statutory planning) and working with allied professionals to support children's individual care and welfare across the school and liaise with a range of health agencies, tick the 2nd box.

For a DHT given responsibility to co-ordinate Support for Learning across the whole Council, tick the 3rd box.

PART 2

JOB SIZING DHT POSTS

In a school where there is more than one DHT position, the objective is to equalise the salary to ensure that no CORE Depute Headteacher position has a salary greater or less than another.

Generally, the responsibilities claimed in sections two through to five will be the same taking account of those areas of responsibility that can only be claimed by one individual. Individual remits/tasks may differ, but the overall responsibilities will be interchangeable with the other DHTs on a shared basis. Such an arrangement ensures flexibility and allows for the rotation of remits across the leadership team.

In a school with multiple DHTs, no postholder should claim for having sole responsibility for deputising for the Headteacher. Such responsibility is shared across the leadership team, and this is reflected through the Toolkit.

Only after the questionnaires for each DHT has been signed off should the information be put through the Toolkit.

There can, however, be situations whereby each DHT has a Toolkit outcome grade the same, but the points allocated differ. This is a possibility and is acceptable for the purposes of Job-Sizing. Should a situation arise whereby there is a difference in grades, then Job-Sizing Co-ordinators, in consultation with the Headteacher /

Education Manager, will make an adjustment to ensure that the remits are equalised and that there is grade parity. If after reviewing sections two through to five and adjusted responsibilities, if necessary, there remains a grade imbalance then, the teaching time hours should be adjusted to achieve parity. **Postholders should be allocated sufficient management time to allow them to fulfil the responsibilities associated with the role.**

It is important to note that each DHT position requires to be job-sized and as a result when a vacancy arises the position must be sized before recruitment is initiated. The objective will remain grade parity; however, it will be necessary to review the questionnaires for other deputies and this can lead to formal Job-Sizing of these posts also. Reference should be made to Part 2 Appendix 2.3: Annex A of the SNCT handbook.

When completing a form for a DHT post, the following guidance should be followed.

SECTION 2: RESPONSIBILITY FOR THE LEADERSHIP, GOOD MANAGEMENT AND STRATEGIC DIRECTION OF COLLEAGUES

In Section 2.1 and possibly 2.2, it is likely that a claim would be made for a DHT who has directed line management responsibilities for Principal Teachers, and in a Primary or ASN setting for teaching staff, and potentially for support staff too.

Any claim would need to be evidenced by providing the name, designation and FTE of the staff line managed. This information is essential to avoid double counting and is used to cross-reference claims for other posts/postholders.

There may be a claim in 2.3 (**Accountability for budgets**) and again this would have to be evidenced, and perhaps for clarity and explanation of how the budget is managed / accounted for. Details to support the claimed amount will require to be provided showing the budget allocation for all staff (budget holders) and cross-referenced with the total budget allocated. The school's Administration and Financial Officer (AFO) or Business Manager should be able to provide this information without a specific exercise being undertaken.

Would expect to see a claim in 2.4 (**Responsibility for health and safety**) with the third box being ticked (**Year groups and / or specialist sections of the school**).

SECTION 3: Responsibility for Curriculum Development and Quality Assurance

3.2 To produce and implement the school improvement plan and responsibility for whole school policies

A claim may be made in box 2, 3 or 4 depending on the level of responsibility a DHT has. Once again this would be evidenced by reference to the SIP.

3.3 To develop the curriculum and monitor learning and teaching

It is not likely for a claim to be made in this section for a Secondary DHT post. It is more likely that there will be a claim in a Primary or ASN setting.

3.4 Other formal management responsibilities

The DHT post that has responsibility for whole school timetabling would indicate this claim in this section (reiterating that only one postholder can claim this responsibility). The first box should be ticked.

The second box specifically captures the responsibilities associated with digital learning across the school, including innovation. This box should not be ticked if the responsibilities are limited to planning, designing, updating the school website, or social media platforms, procurement of IT resources, being the 'go to' person or managing passwords for pupils and staff access.

The second box captures the additional management responsibility that a Primary DHT might have in a school where there is also an Early Education and Childcare provision.

The fourth box captures the strategic responsibilities for Learning and/or Behaviour Support and is distinct from that of a PT Support for Learning or PT Behaviour Support. If, however, a PT has responsibility for the strategic direction of either, a DHT cannot submit a claim for this responsibility whether they line manage the PT or not.

It is not sufficient to claim responsibility in this section if limited to that of a year group.

3.5 Timetabled teaching time

It is now the case that it must be evidenced that a DHT has a formal timetabled teaching commitment in the same way that an unpromoted member of staff has. The timetable is the key document to support a claim in this section.

[A claim can be accepted for the purposes of equalisation of DHT grades]

SECTION 4: Responsibility for Whole School Policy and Implementation

4.1 To develop, manage and implement a policy on pupil behaviour management

The first box should be ticked for 'house' or stage/year group responsibilities including supporting and guiding colleagues on the implementation of the school's behaviour management and promoting positive relationship policy in respect of a specific group of pupils, and taking a senior role in responding and intervening as appropriate, as part of a staged approach.

The second box should be ticked where a DHT is responsible for the behaviour management policy across the whole school.

4.2 To develop, manage and implement a policy on guidance, pupil support, pastoral care and pupil welfare

A claim would be made by a DHT who is responsible for Guidance/Pupil Support across the whole school.

4.3 To develop, manage and implement a policy on pupil assessment

A claim is likely to be made in the second box ticked (**Responsible for pupil assessment relating to a year group or specialist section**) for all DHT's with 'house' group or year group/stage responsibilities for pupil assessment in a Secondary school. The second box would normally be ticked to recognise the responsibilities that a DHT in a Primary or ASN setting has for pupil assessment unless the post has responsibility for the whole school in which case the third box should be ticked. Individual remits and the SIP will provide confirmation of the claim.

The DHT with Qualifications Scotland co-ordinator responsibilities would also tick the third box (**Responsible for pupil assessment policy relating to the whole school**)

SECTION 5: Responsibility for Working with Partners

5.1 To work with parents

Normal routine interactions with parents are captured in the base score for a DHT role. This question captures specific additional responsibilities that a DHT may undertake. For example, the strategic responsibility for parental engagement, linked to local and

national priorities, and/or the delivery of family learning programmes and workshops for parents outwith the pupil day and can be evidenced in the SIP and or school calendar.

5.2 To lead or work with colleagues in the same establishment

It is possible that a DHT will have a claim in this section ticking either the first or second box. It is important to note that the responsibilities may not have been captured elsewhere. For example, line management of staff. This question should be evidenced by the specific remit for the post and may also be evidenced from the SIP. An explanation of how the responsibility is discharged may be required.

5.3 To work with other establishments and agencies

It is possible that a DHT will have a claim in this section ticking either the first or second box. The third box should be ticked if the postholder is required to apply promoted responsibilities in other establishments or agencies.

Any claim would have to be evidenced, and it should be clear from the remit.

PART 3

JOB SIZING GUIDANCE PT POSTS

(May also be referred to as PT Pupil Support, PT Pastoral Support, PT Pupil Welfare or similar.)

Job-Sizing captures the responsibility associated with the PT Guidance/Pupil Support role. One questionnaire should be completed for the role, and not each postholder. This is because it is the role that is sized and not the postholder. There should only be one job description associated with the role and a remit shared across the guidance team.

To capture the shared responsibilities associated with the role some sections of the questionnaire are averaged.

Consideration should be given to the following when a PT Guidance/Pupil Support questionnaire is being completed.

SECTION 2.1 - DIRECT LINE MANAGEMENT RESPONSIBILITY FOR TEACHING STAFF

It is **unlikely** that a PT Guidance/Pupil Support will have direct line management responsibility for other staff but rather have a claim in section 5.2 – To lead the work of colleagues in the same establishment.

SECTION 2.2 – DIRECT LINE MANAGEMENT RESPONSIBILITY FOR OTHER STAFF

Same as 2.1

SECTION 2.3 – RESPONSIBILITY FOR BUDGETS

The PT Guidance/Pupil Support will have a shared responsibility for the overall budget allocated to the department. For the purposes of completing the questionnaire the budget should be averaged across all Guidance/Pupil Support postholders. For example, a budget of £5,000 where there are 6 Guidance PTs, the second box should be ticked 'up to £2,000'.

SECTION 2.4 – RESPONSIBILITY FOR HEALTH & SAFETY

All have a general responsibility for health and safety. This question captures additional responsibilities associated with the role and would normally lead to the creation/updating of risk assessments.

It would not be unreasonable for a PT Guidance to tick the third box 'Year groups and / or specialist sections of the school' as this is most likely to be linked to caseload claimed in section 4.2 of the questionnaire. The additional health and safety responsibilities should be identified. For example, this might include the creation of safe plans for pupils who are at risk of self-harm or suicide, and detailing appropriate mitigations, interventions, and supervision procedures to keep pupils safe.

SECTION 3.2 – TO PRODUCE AND IMPLEMENT THE SCHOOL IMPROVEMENT PLAN AND RESPONSIBILITY FOR WHOLE SCHOOL POLICIES

The second box should be ticked: Responsible for producing and leading some or all of an improvement plan relating to pupil guidance, pupil support, or pupil welfare each year. This box should only be ticked for the post of PT Guidance/Pupil Support.

SECTION 3.3 – TO DEVELOP THE CURRICULUM AND MONITOR LEARNING AND TEACHING

Only timetabled classes for PSHE can be claimed in this section. For the purposes of sizing this role a claim can be submitted for PSHE for each year group. The number of timetabled classes should be averaged across the number of postholders.

In a school there are 10 PT Guidance/Pupil Support and each contributes a 4 week unit (10% of the course) to the PSHE course for each year group. There are 10 classes in each of S1 to S5/6 (combined). In the number of subjects column 1 should be entered, for S1 to S5, and in the number of timetabled classes column, for S1 to S5, 1 class should be entered, representing 10% of the total number of classes in each year group. Part 2: Appendix 2.2, Annex A, Job-Sizing Guidance.

SECTION 3.4 – OTHER FORMAL MANAGEMENT RESPONSIBILITIES

The sixth box should be ticked “Responsible for a guidance caseload and shared whole school responsibility associated with being a PT Guidance”.

SECTION 3.5 – TIMETABLED TEACHING TIME

Guidance/Pupil Support staff may also have a teaching commitment in their own subject as well as PSHE and all timetable teaching hours should be accounted for. As is the case with sections 2.3 and 3.3 the average number of teacher hours for the PT Guidance/Pupil Support staff cohort should be used.

SECTION 4.1 – TO DEVELOP, MANAGE AND IMPLEMENT A POLICY ON PUPIL BEHAVIOUR MANAGEMENT

A PT of Guidance/Pupil Support may have a shared responsibility beyond the general responsibility that a departmental/faculty PT has to implement the school’s disciplinary policy at departmental level. Such a claim would have to be evidenced in the form of clearly set out school procedures that escalated discipline/behaviour referrals to Guidance/Pupil Support after being dealt with at departmental/faculty level.

It is recognised that this is a shared responsibility and working collaboratively with other PTs of Guidance/Pupil Support. This is a shared responsibility and therefore would not be appropriate to claim for whole school responsibilities. The second box should be ticked.

SECTION 4.2 – TO DEVELOP, MANAGE AND IMPLEMENT A POLICY ON GUIDANCE, PUPIL SUPPORT, PASTORAL CARE AND PUPIL WELFARE

The first box should be ticked: Formal guidance, pupil support, pastoral care responsibilities with an identified caseload (Secondary schools only). This box should only be ticked by a PT Guidance.

Having ticked the first box, the relevant box for the size of caseload should be ticked. For the purposes of sizing the caseload is normally determined by dividing the school roll by the number of PT Guidance/Pupil Support in the agreed leadership structure for the school. For example, for a school with a roll of 954 pupils and six PT Guidance the caseload should be 159 (954/6). For this example, the fourth box should be ticked and the actual caseload entered in the box provided.

It is expected that an individual caseload will not exceed 200 pupils. Where this is the case, the roll should be referred back to the Headteacher/Education Manager to address. This is likely to result in an additional PT position being created. The rationale for this is twofold: (1) Very large caseloads can become unmanageable in terms of workload and time; (2) the Toolkit awards no additional points for a caseload in excess of 200.

SECTION 4.3 – TO DEVELOP, MANAGE AND IMPLEMENT A POLICY ON PUPIL ASSESSMENT

The second box should be ticked: Responsible for pupil assessment relating to a year group or specialist section.

PT Guidance/Pupil Support **cannot** submit a claim for assessing their own subject specialism. A claim is permitted for responsibilities associated with assessment, moderation, and assigning curricular levels for PSHE/Health and Wellbeing.

SECTION 5.1 – TO WORK WITH PARENTS/CARERS

All promoted postholders have a responsibility for working with parents/carers and, therefore, this box should only be ticked if there is an additional specific responsibility linked to the school improvement plan.

This question captures additional responsibility for working with parents/carers as evidenced by the school improvement plan and school calendar. Normal reporting /

parental engagement sessions are not captured in this section, but rather are included in the base score for the role.

It is possible that a claim can be made in this section, most likely the first box being ticked. Evidence is required and might include the delivery of UCAS information evenings, or other specific engagement sessions with parents/carers.

A PT Pupil Guidance/Pupil Support post carries a shared responsibility to co-ordinate the issue of careers across the whole school and is required to work with parents on this basis. As this responsibility is not captured by other questions, the 2nd box should be ticked.

SECTION 5.2 – TO LEAD OR WORK WITH COLLEAGUES IN THE SAME ESTABLISHMENT

The first box should be ticked: Responsible for remits that involve leading or working with colleagues in the same establishment on behalf of specified groups of pupils, for example stages, year groups and other identifiable groupings of pupils.

An example could be to lead the work of non-promoted staff timetabled for PSHE, and to work collaboratively with subject specialists in supporting the needs of learners. This could be related to caseload or house groups.

SECTION 5.3 – TO WORK WITH OTHER ESTABLISHMENTS AND AGENCIES

The first box should be ticked: Responsible for remits that involve working with other establishments and agencies on behalf of specified groups of pupils, for example stages, year groups and other identifiable groupings of pupils.

An example could be working with Social Work, third sector organisations, health, Children's Reporter, etc. on a regular basis that requires time to be set aside within the week to ensure that learners needs are met. Attendance at one-off meetings or occasional email exchange / Teams meetings will not in themselves fulfil the requirement for a claim in this section.